Legacy Resource Management Program
Guidelines for Full Proposal Applicants

Following is important information that applicants should follow to ensure their Legacy proposals are correctly submitted.

Proposals Tab

- Login to the Legacy Tracker (Tracker), choose the proper fiscal year from the pull-down list, and select the title you used on your pre-proposal.
- Ensure that all information currently included in the pre-proposal is accurate.
- Carefully read all Legacy Program staff feedback, and incorporate any edits into your Full Proposal.
  - Check the notes section of the Action & Review tab for feedback.
  - Check any notification emails from Legacy Program staff.
  - NOTE: emails sent by the Tracker sometimes end up in spam or junk folders.
- **Ensure text contains no formatting** when copying and pasting it into the Tracker.
  - If you're using Microsoft Word, highlight all of the text, copy it, and paste it into the Notepad program, which is preloaded on most Windows-based computers.
  - Once you're satisfied with the text in Notepad, choose Edit, Select All, and then select Edit, Copy. Next, go to the Tracker; put the cursor in the desired field, and hit Ctrl + V to paste the unformatted text into that section.
- Abide by character limits described in the Tracker.
  - Failure to remain within these limits can negatively impact your chance of receiving funding.
- After making modifications to *any* portion of text in the Tracker, hit the Save button ***before*** proceeding to a new tab.
- Clicking the Next button before clicking the Save button may result in data loss.
- There are additional fields to complete in the Full Proposal form.
- Complete all new fields added to the Full Proposal form.
  - Required fields are denoted with a red asterisk(*).
- **Verify Full Proposal Submittal**
  - After you have completed all required fields (described below) and submitted your proposal, ensure that the Full Proposal title is listed and the "Status" column reads "In Review."
  - If your proposal is not listed, please contact Legacy Program staff immediately.

Admin Tab

- *Author and Co-Author*: enter the project Author and, if applicable, email DoDLegacy@bah.com to add a Co-Author.
  - The Author is the primary proposal author, the main point of contact for the overall scope of work, and the project's lead investigator and coordinator. This individual is not necessarily the entity requesting the largest amount of funding.
  - The Co-Author is a co-Principal Investigator (PI), backup to the Author, or even the PI when the primary Author is overseeing multiple components of a larger effort. The Co-Author could also be an individual from a partnering organization who will not be the main point of contact for the overall scope of work, but who will also request funding. The Co-Author must have a Tracker account, but he or she cannot edit or submit the proposal.

    - NOTE: You must provide strong justification for why more than one organization is requesting funding, vs. having one organization request funding and sub-allocate, as needed, to other groups.
- *Project Title*: the project title should already appear in this field. This is the title you entered for the pre-proposal. Project titles should not be changed without Legacy Program coordination.
- *Sponsor*: the sponsor is the Military Service that has agreed to support and help coordinate the project. This field can have a value of one specific Military Service **or** DoD. Some projects are more appropriately coordinated at the Office of the Secretary of Defense (OSD) level, and are therefore "sponsored" by DoD instead of a Military Service. Use the pull-down list to select the proper proposal sponsor.
- *Have you already made contact with the abovementioned sponsor*: select yes or no to answer this question.
    - ***IMPORTANT***: applicants must contact the sponsor before submitting the Full Proposal.
- *CMD Division*: this is the Military Service Command that will be responsible for project oversight. Use the pull-down list to select the proper division or headquarters. If you are unsure of what CMD Division applies, if any, contact the appropriate Military Service representative or Legacy Program staff for assistance. Use the *Contact Us* link on the Legacy Program website homepage to access Military Service representative contact information.
- *State*: enter the state in which the primary installation is located. If the project is national, then enter the state in which the majority of the work will take place or, if work is not concentrated in a single location, where the applicant is located.
- *Country*: enter the country in which the "State" is located.
- *Continuation Project*: select yes or no to indicate if this is a continuation project or not.
    - If the current proposal is considered a continuation of a previously funded Legacy project, provide the previous Legacy project number.
- *To the best of your knowledge, is your work original and not duplicative of existing efforts*: select yes or no to indicate if this is an original project or not.
- *Will you need to access a DoD installation, its personnel, or its resources/ data*: select yes or no to indicate whether you will need to access a DoD installation, its personnel, or its resources/data.
- *Installations*: enter the installation at which the project will take place. If there is no on-installation activity (e.g., technical data analysis), leave this field blank.
- *Expected Completion Date*: enter the date by which you will complete and submit all FINAL deliverables for the given year's effort. Please note the Legacy Program requires PIs to submit draft deliverables for review before finalizing all products.
- *Field Location*: enter the location(s) where you will execute the project. This could be a site location, state name, region, or the primary installation name. This field is visible only to the project owner and to Legacy Program staff.
- *Requesting Organization #1*: enter the name of the organization requesting funding for the project.
    - If necessary, enter additional organizations requesting funding. Applicants must explain why additional organizations must receive funding directly from Legacy rather than sub-allocating to partners.

    - Contracting offices allow organizations to sub-allocate funding only if a non-federal agency is the recipient of sub-allocated funds. If a federal agency and a non-federal agency plan to collaborate on a proposed project, both requesting organizations must be listed.
- *Primary Theme*: the primary theme is the dominant or unifying subject of the project. The primary theme that you selected in your pre-proposal will appear here.
- *Secondary Theme*: the secondary theme is the subordinate subject of the project. The secondary theme that you selected in your pre-proposal will appear here.
- *Project Category*: use the pull-down list to select Natural Resources, Cultural Resources, or Integrated Natural & Cultural Resources. This selection should match the *Resource Type* you indicate on the Resources Tab.
- *Other Funds Available*: this field applies to project activities that are or will be funded by sources other than the Legacy Program, including direct financial contributions and in-kind support. "In-kind" support is the contributed value of goods and services provided by non-federal third parties. Third party in-kind contributions may be in the form of real property, equipment, supplies, etc. as well as the value of services (e.g., quantifiable salary) directly benefiting and specifically attributable to the project.
- *Describe Funds*: describe outside funding sources and amounts, and outline exactly how you intend to use and execute those funds. While other funding is not required for a successful proposal, it is a benefit and you should quantify it during the proposal phase.
    - Resources leveraged from federal agencies should be listed here (e.g., loaned or donated equipment such as vehicles or data processing software).

Resources Tab

- *Resource Type*: use the pull-down list to select Natural Resources, Cultural Resources, or Integrated Resources to indicate which type best describes the proposed project.
- *Area of Emphasis*: select the single most relevant topic from the list provided on the Tracker (e.g., Context and Model Development, Integrated Resource Management, National and International Initiatives).

Purposes Tab

- *Purpose*: select at least one of the options available, though you may select multiple options, provided all options selected are directly relevant to your proposed work.

Federal Regulations Tab

- *Federal Regulations*: select one or more of the options available to indicate which regulations (e.g., Defense Authorization Act, 10 USC 2684a; Endangered Species Act; National Historic Preservation Act) the proposed project best supports.

Budget Details Tab

- This section indicates how the applicant intends to allocate funding for the project. (ENTER BUDGET ITEMS **ONLY** FOR THE CURRENT FISCAL YEAR. Address budget items for future fiscal years in the *Describe Follow-on* field in the Follow-on Work tab.)

- The Legacy Program strongly prefers to send all funds to one organization, which can then sub-allocate to the other organizations. Please explain why this is not possible if more than one organization is requesting funds be sent directly from Legacy.
    - NOTE: Contracting offices allow organizations to sub-allocate funding only if a non-federal agency is the recipient of sub-allocated funds. For projects implemented by both federal and non-federal partners, all requesting organizations must be listed, and a justification for each applicant's role provided.
- Profit is not an acceptable budget item. Any fees or burdens should be incorporated into the hourly rates provided.
- The budget fields that you must populate are:
    - *Item*: do not lump costs, but instead select different line items for each budget item from the pull-down list:
        - **Equipment** – equipment (e.g., GPS units, radio collars) to be purchased for the proposed project.
        - **Materials/Supplies** – materials and/or supplies (e.g., postage, office supplies) required for the proposed project.
        - **Salary** – salary, including number of hours and rate per hour for each performer.
        - **Other Labor** – salary for sub-allocated or contracted labor.
        - **Overhead/Admin** – indirect or general expenses (e.g., utility costs).
            - ***IMPORTANT***: Unless your organization negotiated a special rate with DoD, the Legacy Program approved maximum rate for overhead/administrative costs is **17.5%**.
        - **Travel** – all travel costs associated with the proposed project (e.g., airfare, lodging, per diem, car rental, parking, mileage).
            - **NOTE: Legacy is no longer able to fund workshops, conferences, meetings, etc.**
            - **Travel to existing events also is severely restricted. Applicants must include a strong justification for any requested travel support.**
        - **Other** – costs that don't fall under any of the other categories.
    - *Description*: a detailed description of the budget item, including specific information on each subtotal's calculation.
        - For Salary, include position, a brief summary of duties, the total number of hours, and hourly rate.
        - For Equipment, include what you're purchasing, the quantity, and unit cost as applicable.
        - For Travel, include all details associated with the cost, such as reason for trip, number of travelers, what type of cost (e.g., lodging, airfare, parking, car rental), and rate(s).
        - If you need funding for in-house laboratory testing, please include a detailed materials and labor breakdown of that analysis.
        - If an external laboratory is conducting an analysis, please include the laboratory name and a description of the analysis being performed, categorized per sample cost and total.
    - *Cost*: total amount requested for each budget line item.

- The following is an example of a detailed proposal budget field. Note the rates shown below are examples created for illustration purposes only.

EXAMPLE BUDGET

Item	**Description**	**Cost**
Salary	Researcher/Project Manager – to oversee project research and documentation, and develop report ($80/hour for 100 hours)	$8,000
Salary	Research Assistant to support and assist the Researcher for 3 months @ $30/hour for 300 hours	$9,000
Travel	Lodging for 2 people at the General Inn hotel, 30 days at $50/ person per day	$3,000
Travel	Airfare for 2 people from Someplace, VA to Another Place, CA at $500/ person	$1,000
Equipment	1 GPS tracking receiver	$200
Materials/ Supplies	5 tracking collars at $20 each	$100
Other Labor	Guide/Bear tracking expert for 2 weeks @ $40/hour for 80 hours	$3,200
Other	Nature Reserve research fee of $25 (x 2 researchers)	$50
Total		$24,550

Contributing Partners Tab

- Document the dollar value of partner contributions to the project, if applicable. If you add a Contributing Partner, you are required to populate each field. In the case of multiple Contributing Partners, at least one budget item is required per funding recipient. You should round the Item Cost to the nearest dollar.
    - The required fields are:
        - *New Contributing Partner*: name of the organization contributing funds, goods, or services.
        - *Item*: items/services being contributed (e.g., donated property, equipment, volunteer services).
        - *Description*: description of items/services being contributed.
        - *Value*: dollar value of items/services being contributed.
- ***IMPORTANT***: provide enough detail to allow the proposal reviewers to understand exactly how you derived the total for each budget line item. For example, if partners are contributing salary, provide the hourly rate of the person performing the work. If partners are contributing equipment, provide the commercial value of the equipment.

Project Details Tab

- *Project Synopsis*: provide a few sentences, not to exceed 1,024 characters (including spaces), that succinctly describe what the project will do, what the results will be, and how those results will benefit DoD and/or the Military Services.
    - ***IMPORTANT***: this is generally the only explanatory information provided to leadership, so applicants should spend an appropriate amount of time writing the *Project Synopsis*.
- *Abstract & Work Plan*: enter text that is comparable to an executive summary. This should break out and detail the *Project Synopsis*.
    - This section should outline the approach and subsequent work plan. Clearly state the need for the proposed work and the objectives. You should provide detailed

descriptions of the proposed work, objectives, and work phases in the Scope of Work tab.

- *Background*: explain if the proposed work relates to any other projects conducted by DoD or another agency, organization, or firm, including projects that the Legacy Program has already funded.
  - For continuation projects, you must include what work, phases, and products you (or another entity) completed during the previous funding year(s).
- *Military Mission Benefits*: concisely articulate how this project benefits the military mission. The proposed project *must* support military readiness and testing/training. You must correlate your proposed work with cultural resource preservation and/or natural resource conservation and specifics of current military mission objectives. Applicants should detail exactly how and where their project will benefit the military, including listing all known installations or specific regions that would directly benefit from the proposed work. Discuss all conversations you've had with installation contacts that contribute to illustrating the need for, and value of, the proposed work. If this is a continuation project, discuss and articulate the military benefit so far achieved.
  - DO NOT provide an overview of the entire project or repeat the list of anticipated deliverables in the *Military Mission Benefits* section.
- *Primary Personnel*: list the name, organization, and position for all primary personnel who are involved in completing the project.
- *Will you be uploading a map or figure*: select Yes or No to indicate whether you will upload a map or figure.
  - If you select Yes, click the Browse button to choose the file on your computer that you intend to upload, enter a title, and select Upload File.
- ***IMPORTANT***: ensure you populate all fields and remain within the specified character limits indicated on the Tracker.

Scope of Work Tab

- *Approach*: list the activities for the organization receiving funds. If more than one organization will receive funds or do work, specify which organization is lead, and clearly detail the activities for each organization. Discuss how the proposed work will be carried out, who will be carrying it out, and how each organization proposes to obligate funds, as applicable.
  - Expand upon each step listed in the Pre-Proposal's Work Plan for **each** organization; detail all planning, execution, and analyses phases here.
    - Remember, the proposed work must address a current DoD need. Describe both the need and how the proposed work relates. Explain how the need was determined. Discuss all conversations you may have had with DoD personnel that contribute to illustrating the need for, and value or benefits of, the proposed work. **Be specific in what you intend to do and address, tying it back to the need and the military mission. Describe the expected products or deliverables of the proposed work here**.
    - Provide a comprehensive, numbered list of work phases (include planning, execution, and analyses), and methodology that will be used for each phase. Cover the WHAT, HOW, and WHERE description here, and

clearly state which installations will be involved. Be sure to correlate development of expected products within the work phases.

Follow-on Work Tab

- The Author must select one of the following three options that best describes applicable follow-on funding requirements for the project:
    - Project has no foreseen need to request funding for future years.
    - Project has follow-on work necessary to complete current proposed effort (user has explicit intention to request more funding to complete current proposed project).
    - Potential proposal ideas that could be submitted as new projects in the future (user has ideas for future activities that further the scope of proposed project).
- If you select an option for "potential proposal ideas," briefly describe that work and the associated budget for the next three fiscal years.

Expected Products Tab

- List all expected products/deliverables that will be submitted during the project's period of performance.
- The Author must complete the following fields:
    - *Product Type*: choose the most appropriate product type from the pull-down list.
    - *Brief Description*: a single sentence describing the expected product.
    - *Date Due*: the intended delivery date of each expected product. This value must be the same as, or a date prior to, the project's completion date. That is, all products must be submitted *and accepted* by the Legacy Program before the project's end date.
- ***IMPORTANT***: The itemized products list should include a six-month progress report, Legacy Program fact sheet (one-page summary of the overall effort), and any other deliverables associated with the completion and implementation of the proposed project.
- **For the six-month progress report, please select 'Interim Report' from the Product Type pull-down list.**
    - If your proposal is funded, you will find the six-month progress report template on the Progress Report tab under your project's file on the Legacy Tracker.
    - The template for the Legacy Program fact sheet is located on the Tracker under the Info & Guidelines tab at the top of the page.
- Enter expected products separately for each organization requesting funding.
    - Click on the specific Requesting Organization at the top of the page to indicate deliverables for the proper organization.
- ***IMPORTANT***: If you are a non-federal agency or organization, the award made by Legacy will likely come via a Cooperative Agreement from Washington Headquarters Services (WHS) or the U.S. Army Corps of Engineers, Engineer Research and Development Center, Construction Engineering Research Laboratory (ERDC-CERL) as the contract Designee. If you receive funding via a Cooperative Agreement from ERDC-CERL, you are required to include a non-Legacy Program progress report with each invoice you submit. These one-page progress reports must be sent to ERDC-CERL, not Legacy. These invoice-related progress reports are not included as Expected Products in the Legacy Tracker because they are not Legacy reports. If you are awarded funds

through a Cooperative Agreement, the agreement will specify all terms, conditions, and details. Please ensure you consider completing and submitting progress reports and invoices as part of the contracting process, and include the reports in your overhead activities.[1]

Technical POC Tab

- This is the contact information for the person responsible for ensuring the project's successful completion. This tab must be kept current throughout the project's period of performance. Contact Legacy Program staff to update the name, phone, fax, email, etc. of the Technical POC.
- You must enter Technical POC information for each organization requesting funding directly from the Legacy Program. NOTE: if you intend to sub-allocate funds to other organizations, you do not need to enter Technical POC information for those organizations unless the organization is a federal agency. NOTE: whether an organization is listed here or not, key staff should still be listed in the Primary Personnel section.

Financial POC Tab

- This is the contact information for the person who is authorized by the recipient organization to sign the appropriate funding documents (Military Interdepartmental Purchase Request [MIPR], Cooperative Agreement, or Project Order). This tab must be kept current throughout the project's period of performance. Contact Legacy Program staff to update the name, phone, fax, email, etc. of the Financial POC.
- You must enter Financial POC information for each organization requesting funding directly from the Legacy Program. NOTE: if you intend to sub-allocate funds to another organization, you do not need to enter that organization's Financial POC information unless that organization is a federal agency. It will be your responsibility to track, expend, and report ALL funding.

DoD Tab

- This section of Tracker is for internal Legacy Program staff use only.

Action & Review Tab

- Project Authors must indicate the type of award they hope to receive (MIPR, Project Order, or Cooperative Agreement) in the comments section.
    - You must select "Save with no Action" from the Action pull-down list at the top of the page to open the Comments field for typing to enter your award preference.
- To save the Full Proposal and return to complete it later, select "Save with no Action" from the Action pull-down list at the top of the page, and then select "Submit."
    - Be sure to check the notes section on this tab to find pre-proposal feedback from Legacy Program staff.
    - Incorporate Legacy feedback as appropriate.
- To submit a completed Full Proposal, select "Submit Proposal to OSD" from the Action pull-down list at the top of the page, and then select "Submit."

[1] The non-Legacy Program progress report template is located in Appendix A.

- **You will be unable to access or modify your proposal once it has been submitted to OSD.**

Letters of Support Tab

- There are two types of letters that illustrate proposal support: 1) the *Electronic Letter of Support for DoD Installation Use*, which provides DoD support for installation access and use, and 2) the *Letter of Endorsement*, which supports a proposed project but does not offer permission to access and use an installation. Please email letters to DoDLegacy@bah.com and Legacy Program staff will upload them to the Tracker.
- If your proposal involves monitoring, data collection, or contacting personnel for information on one or more DoD installations, an *Electronic Letter of Support for DoD Installation Use* is required.
  - ***IMPORTANT***: YOU, and not the Legacy Program, must obtain proper authorization from the appropriate Military Service point of contact(s) for any on-installation work.

Purpose Statement

- The Legacy Program began using WHS as a contract Designee for some Cooperative Agreements in fiscal year 2014. WHS requires a completed purpose statement for all funding they award via a Cooperative Agreement.
  - For those organizations who will be awarded funds via a Cooperative Agreement, Legacy Program staff will provide the purpose statement template and ask them to complete the highlighted fields. Project Authors must complete and return the purpose statement before funds can be awarded.
- Use information included in your proposal on the Tracker to complete the highlighted fields and return the completed purpose statement to Legacy Program staff.[2]

Generally, Successful Full Proposals Will:

- Clearly define the direct benefit to the military mission, indicating Military Service benefit, direct testing and training benefits, and/or any DoD-wide significance.
- Present a *Project Synopsis* that clearly defines the proposed project's objective and the need for the proposed work (i.e., what the project will do, why it's important, and how it will benefit the military's mission).
- Clearly outline the *Work Plan* and *Project Approach* to include planning, execution, and analysis phases.
- Clearly define any relationship between the proposed work and other related or similar work completed or currently underway.
- Define *Expected Products* that will result from the current proposed effort's period of performance.
- Itemize, in appropriate detail, the project's proposed budget as described in the *Budget Details* section.
- Include, as needed, an *Electronic Installation Letter of Support*.

[2] The WHS purpose statement template is located in Appendix B.

Appendix A: Template for Non-Legacy Program Progress Reports that Accompany ERDC-CERL Cooperative Agreement Invoices:

MONTHLY PROGRESS REPORT	
Contractor Name:	
Contractor Address:	
Contract/Purchase Order No.	Task Order No.
Project Title:	
Period Covered:	
POC/COR (Reference Paragraph 5 of the SOW):	
Achievements (Describe by task. Add additional tasks, if needed.):	
Task 1:	
Task 2:	
Task 3:	
Problems Encountered (Describe by task. Add additional tasks, if needed):	
Task 1:	
Task 2:	
Task 3:	
Open Items (List items that require action by the Contractor or the Government):	
Summary Assessment and Forecast (Provide an overall assessment of the work and a forecast of contract completion):	

Appendix B: WHS Purpose Statement Template:

Base Period (MONTH DAY, YEAR – MONTH DAY, YEAR)

INSERT PROPOSAL TITLE HERE

PLEASE DO NOT INSERT ANY INFORMATION THAT IS NOT INCLUDED IN YOUR PROPOSAL ON DODLEGACY.ORG

PURPOSE OF AGREEMENT: The Department of Defense (DoD) seeks to enter into a cooperative agreement with the requesting organization 1 to purpose (2-3 sentences). Specifically, this agreement will enhance military readiness by insert how and where this project will enhance military readiness.

BACKGROUND: Insert relevant background information (~150 – 200 words)

OBJECTIVE: DoD seeks to implement this agreement with the requesting organization 1 whose purpose is to insert the project's objective (~200 words)

Specifically, the project will allow DoD to objective/purpose by:

1) Deliverable 1
2) Deliverable 2
3) Deliverable 3
4) Deliverable 4
5) Deliverable 5
6) Deliverable 6
7) Deliverable X (please insert additional deliverables, if needed)
8) Presenting progress reports every six months
9) Delivering a Legacy project fact sheet to highlight results

Budget Estimates:

Item	Item Cost ($)
Equipment	Equipment subtotal
Materials/Supplies	Materials/Supplies subtotal
Other	Other subtotal
Other Labor	Other Labor subtotal
Overhead/Admin	Overhead/Admin subtotal
Salary	Salary subtotal
Travel	Travel subtotal

Total Cost: $Total Cost